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Training Guide – Travel & Expenses

Updating Employee Supervisor in T & E

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State of Kansas

# Travel & Expenses – Updating Employee Supervisor in T & E Training Guide

Statewide Management, Accounting and Reporting Tool

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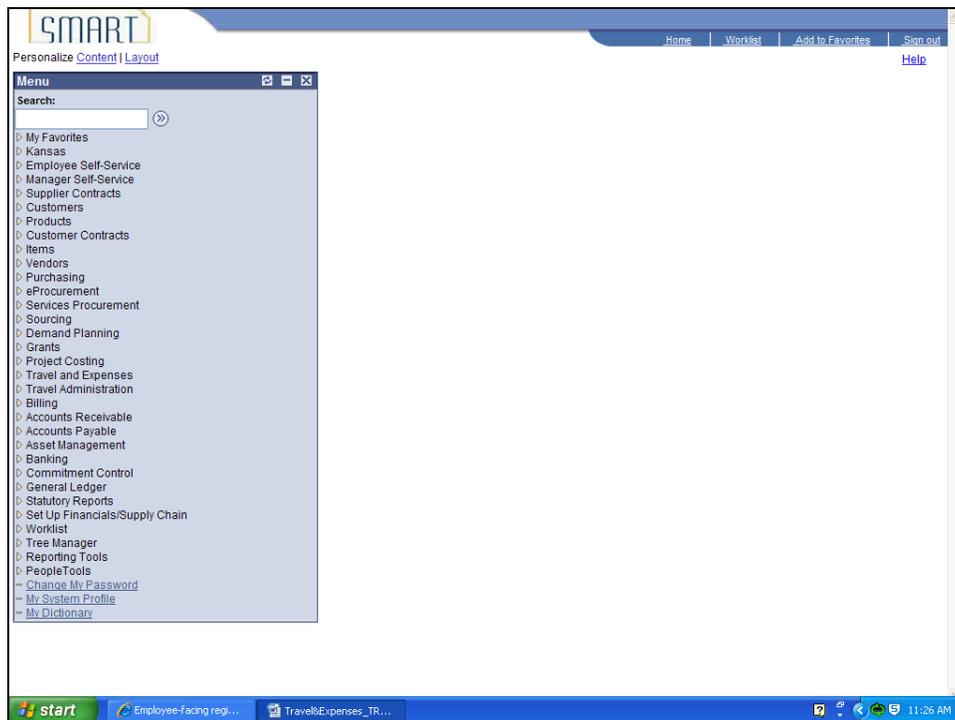
## Travel & Expenses

### Updating Employee Supervisor in T & E

#### Procedure

An Agency Travel & Expenses Maintainer sometimes will need to update certain elements of an employee's profile. The employee's supervisor is one such element.

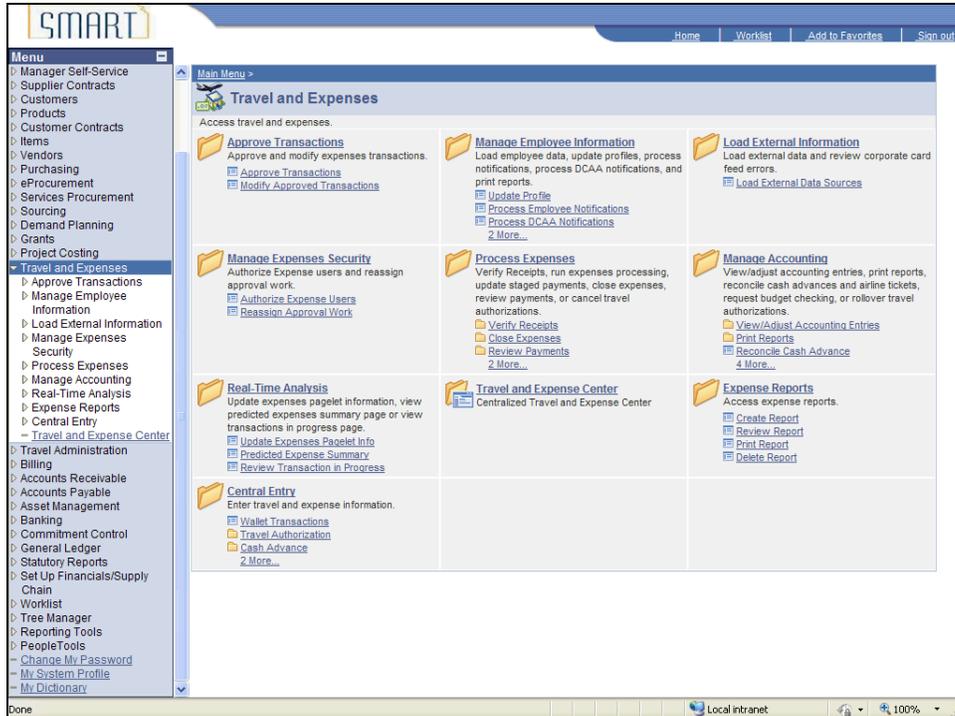
Step	Action
1.	<p>The TE Maintainer will update an employee's supervisor if either:</p> <ul style="list-style-type: none"><li>• The supervisor noted in SMART is not the person who approves Travel &amp; Expenses transactions for the employee at the supervisor level, or</li><li>• SMART has no information in the supervisor fields for the employee. (In the instance no supervisor shows in SHaRP, none will show in SMART, either.)</li></ul>



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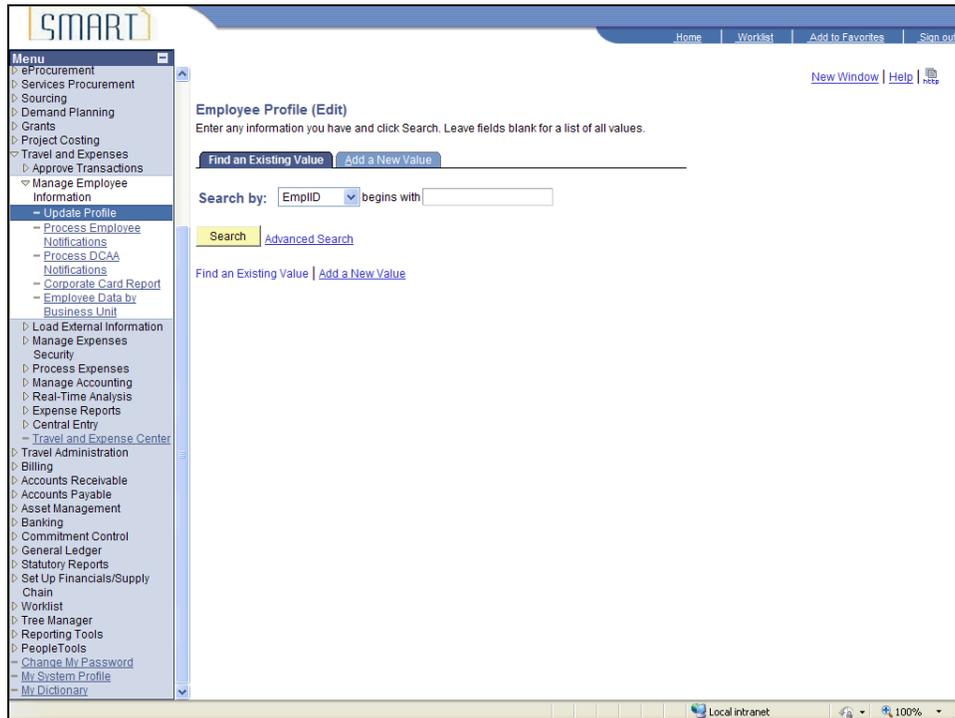
Step	Action
2.	<p>From the home page, click on the <b>Travel and Expenses</b> link in the Menu.</p> <p>Click the <b>Travel and Expenses</b> link.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Travel and Expenses</div>



Step	Action
3.	<p>SMART opens the Travel and Expenses menu.</p> <p>Click the <b>Manage Employee Information</b> link.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Manage Employee Information</div>
4.	<p>SMART opens the Manage Employee Information menu.</p> <p>Click the <b>Update Profile</b> link.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">Update Profile</div>
5.	<p>SMART opens the Employee Profile (Edit) page. Be certain the "Find an Existing Value" tab is highlighted.</p>

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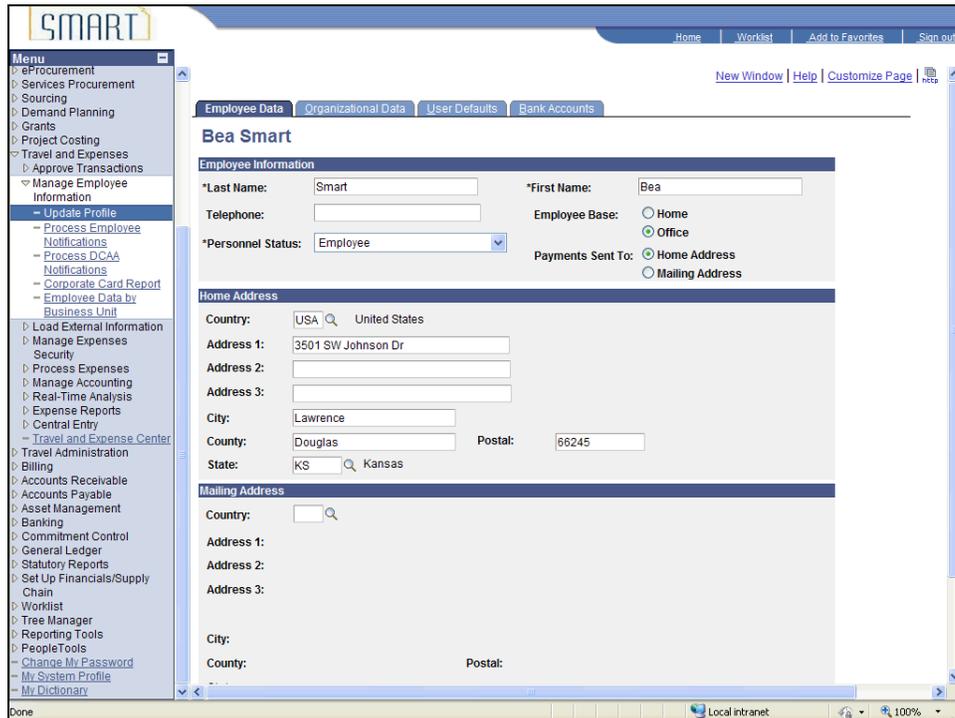
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Step	Action
6.	<p>The State of Kansas Employee ID Number for the person whose profile you are updating goes in the "begins with" field.</p> <p>Click in the <b>begins with</b> field.</p> <input type="text"/>
7.	<p>Enter the desired information into the <b>begins with</b> field. For this simulation, enter <b>"K000220285"</b>.</p>
8.	<p>Click the <b>Search</b> button.</p> <input type="button" value="Search"/>

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Step	Action
9.	<p>SMART opens the employee profile to the <b>Employee Data Tab</b>. There are a series of tabs across the top of the page. To change the Supervisor, you will go to the <b>Organizational Data Tab</b>.</p> <p>Click the <b>Organizational Data</b> tab.</p> <p><b>Organizational Data</b></p>

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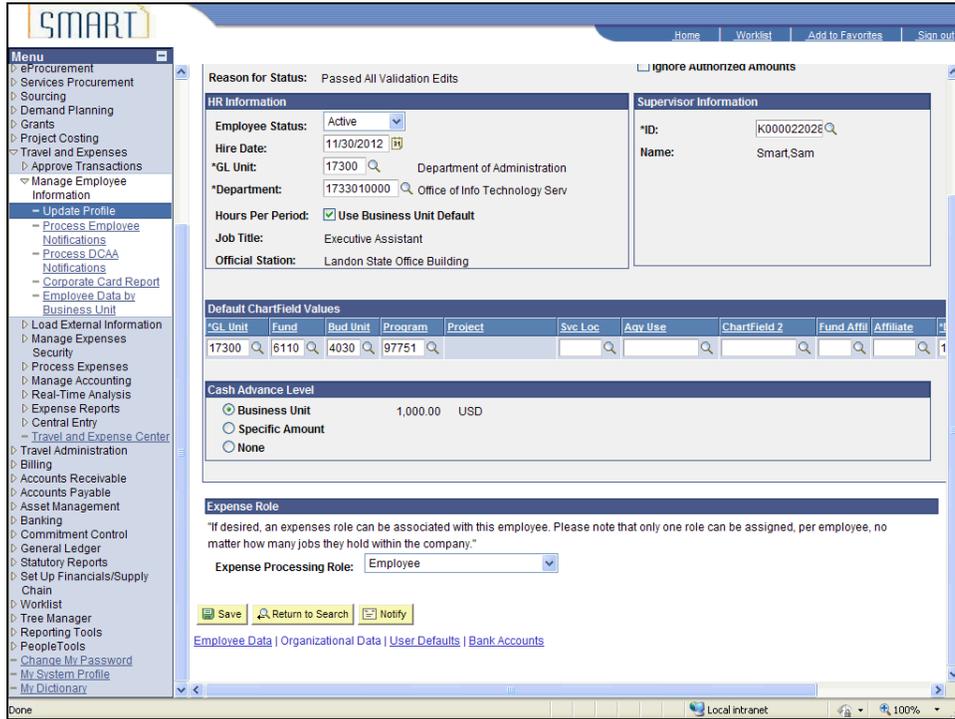
The screenshot shows the SMART system interface for updating an employee's supervisor. The main content area is titled "Bea Smart" and contains several sections:

- Expenses Processing Data:** Includes "Valid for Expenses: Yes", "Reason for Status: Passed All Validation Edits", and checkboxes for "Default Profile" (checked) and "Ignore Authorized Amounts" (unchecked).
- HR Information:** Includes "Employee Status: Active", "Hire Date: 11/30/2012", "\*GL Unit: 17300", "\*Department: 1733010000", "Hours Per Period: Use Business Unit Default (checked)", "Job Title: Executive Assistant", and "Official Station: Landon State Office Building".
- Supervisor Information:** Includes "\*ID: K000022028" and "Name: Smart Anthony".
- Default ChartField Values:** A table with columns for \*GL Unit, Fund, Bud Unit, Program, Project, Svc Loc, Adv Use, ChartField 2, Fund Affn, and Affiliate.
- Cash Advance Level:** Includes "Business Unit" (selected), "Specific Amount", and "None".
- Expense Role:** A note stating "If desired, an expenses role can be associated with this employee. Please note that only one role can be assigned, per employee, no".

Step	Action
10.	<p>You will update the employee's supervisor in the "<b>Supervisor Information</b>" box. Most often, this box will be prepopulated by information from SHARP. Changes occurring in SHARP often cause this information to also change in SMART. Manually entering the supervisor's Employee ID number here, though, will leave the information here until it is changed again from this page, even if the employee's supervisor changes in SHARP.</p> <p>Click in the <b>Supervisor Information ID</b> field.</p> <p><input type="text" value="K000022028"/></p>
11.	<p>Type the State of Kansas Employee ID Number for the person responsible for the supervisor level approval of travel and expense transactions.</p> <p><b>IMPORTANT:</b> When selecting a supervisor in SMART you must ensure that the supervisor listed is not a proxy who will enter and submit the expense report. If a person enters and submits an expense report AND they are listed as the supervisor-approver, the transaction will error out. If this happens, the agency's Security Liaison must open a Service Desk request for assistance.</p> <p>Enter the desired information into the <b>ID</b> field. For this simulation, enter "<b>K0000220283</b>".</p>
12.	<p><b>IMPORTANT:</b> The employee's supervisor information is maintained in SMART's <b>Travel and Expenses</b> module, but is not reported to <b>SHARP</b>. This process changes the supervisor only for purposes of workflow, where the employee's travel and expenses are concerned.</p>

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Step	Action
13.	<p>To retain the supervisor ID you just typed, you must save this information to SMART.</p> <p>Click the <b>Save</b> button.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block;">  Save         </div>
14.	<p><b>IMPORTANT:</b> As a rule of thumb, a supervisor entered into SMART following this process will stay in SMART until updated again.</p> <p>However, it is highly recommended to check the employee's profile to make certain the supervisor setting is correct before creating an expense report.</p>
15.	<p><b>CONGRATULATIONS!</b></p> <p>You have now completed the process for updating a T &amp; E supervisor in SMART.</p> <p><b>End of Procedure.</b></p>